

Delegate profile setup is a two-step process you must complete for each agency/division in your agency. This process adds the available managers to the Temporary Delegation pane.

Step 1 - Delegate Profile Setup

- 1 From the **Related** Items pane, select **Setup**. Then select **Delegate Profiles**.

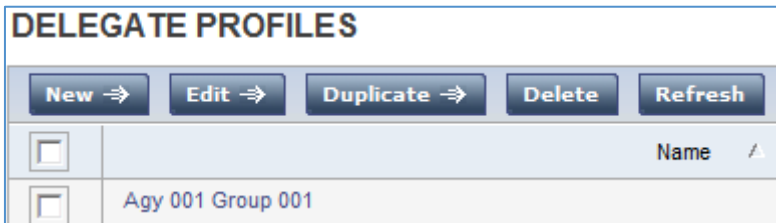


SETUP
Expand All | Collapse All

Common Setup

- Delegate Profiles
- HyperFind Queries
- Query Manager

- 2 Select **New** from the **Delegate Profiles** screen.



DELEGATE PROFILES

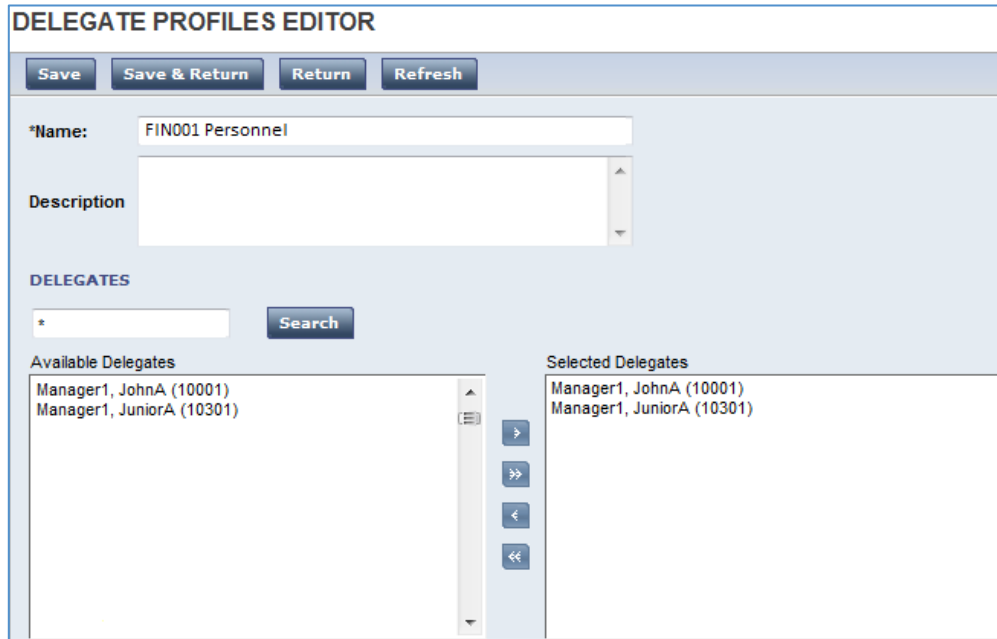
New → Edit → Duplicate → Delete Refresh

<input type="checkbox"/>	Name
<input type="checkbox"/>	Agy 001 Group 001

- 3 Enter the name of the profile in the **Name** field.

Note: Use a standard naming convention for the agency to clarify each agency or division, such as **FIN001 Personnel** or **AG002 Accounting**.

- 4 Select the **Search** button to retrieve a list of manager delegates. To narrow the search, enter a letter or letters of the last name in front of the asterisk (*), then select **Search**.



DELEGATE PROFILES EDITOR

Save Save & Return Return Refresh

*Name: FIN001 Personnel

Description

DELEGATES

* Search

Available Delegates

- Manager1, JohnA (10001)
- Manager1, JuniorA (10301)

Selected Delegates

- Manager1, JohnA (10001)
- Manager1, JuniorA (10301)

- 5 The **Available Delegates** display. Select the desired delegate(s), then the right arrow button → to move from **Available Delegates** to **Selected Delegates**.

Note: To select more than one delegate, hold down the CTRL key and click on each name, then the right arrow button.

- 6 Click the **Save** button.

Step 2 - Assigning the Delegate Profile to the People Record

- 1 From the Agency Administrator workspace, select **My Genies>QuickFind**. Note that both **Reconcile Timecard** and **QuickFind** may be accessed from the **Related Items** pane located on the right-side of the screen.

Timecard | Schedule | People | Reports | Leave Cases

QUICKFIND

Last Refreshed: 2:48PM

Name or ID:

Time Period:

Name	ID	
Manager1, JuniorA	10301	001/0000/100010/10001/-/-

- 2 Locate manager(s) to be added to the delegate profile.
- 3 Highlight the manager name(s).
- 4 Select **People** from the **Quick Links** menu.

PEOPLE EDITOR

Loaded: 1:13PM

Name & ID:

PERSON | **JOB ASSIGNMENT**

Actions History

Job Assignment Summary

Primary Account

Timekeeper

Employment Terms

Personal Overtime

Scheduler

Access Profiles

Manager Role - General

Manager Role - Scheduler

Access Profiles

Function Access Profile:

Display Profile:

Locale Policy:

Delegate Profile:

Generic Data Access Profiles

- 5 Select **Job Assignment** tab.
- 6 Select **Access Profiles**.
- 7 Select the delegate from the **Delegate Profile** drop down.
- 8 Click the **Save** button.

Now the delegates are available on the Temporary Delegate pane, which must be complete at the time you wish to delegate. Refer to the **Manager Delegation for Requesting Backup Coverage** job aid for assistance.

Repeat for each manager.

If a manager needs to be removed from a delegate group, change the **Delegate Profile** in their People Record to reflect **Empty Profile**. Next, on the **Delegate Profiles Editor** screen, highlight the manager and move their name to the **Available Delegates** window using the arrow.

Note: A person cannot edit his/her own People Editor record. For those who need to be added to the new Delegate Profile, Step 2 - Assigning the Delegate Profile to the People Record will need to be completed by another Agency Admin.